The Pipeline Inspection Worksheet

Find the next management action without turning the review into a status recital

For sales managers, directors, VPs and revenue leaders

A pipeline meeting should reveal where a manager can help. Use a small sample of deals, buyer evidence, and clear owners to finish with a short list of useful actions.

Inspect change, risk and action

Start with what changed since the last review. Then identify the risk or unknown that could affect the buyer's decision. End with an action that has an owner and a date. Keep aggregate coverage and forecast reporting in your existing system.

Choose the deals with a reason

Select a few deals with a meaningful change, a close-date dependency, or a need for help. Avoid spending equal time on every row. Record why each deal needs discussion before the meeting.

Separate four kinds of evidence

Distinguish buyer statements, buyer actions, rep activity and manager interpretation. All can be useful; they answer different questions. A busy activity history alone does not establish progress toward a purchase.

Leave with fewer, clearer actions

Choose the most useful next step for each reviewed deal: an introduction, an answer, a decision-path check, or a hold. Assign responsibility and review the result next time. Do not change your team's stage rules from this worksheet alone.

Put conversation context to work

Revenue.io connects captured conversations with Salesforce context so teams can review buyer needs, coach specific moments and follow through on next steps. Use this worksheet with your current process.

See Revenue.io

A review that produces a management action

Illustrative team review. A proposal-stage deal has been quiet for two weeks while the rep continues outbound follow-up.

Change

The buyer postponed the agreed review meeting. The rep has sent two reminders, with no reply. No new buyer action is recorded.

Risk or unknown

The team does not know whether the project is paused, whether a stakeholder is missing, or whether the proposal left a question unanswered.

Action

The rep sends one concise note asking whether the decision timing changed and offering help with the unresolved question. The manager reviews the response at the next check rather than adding more reminder tasks.

A 20-minute team agenda

Two minutes to choose the focus, twelve minutes for up to three deals, and six minutes to confirm actions and owners. Move deep technical work and individual skill practice into separate follow-up sessions.

Questions for your next review

1. What changed for the buyer since the last review?
2. Where is evidence missing or contradictory?
3. What can a manager do that will help the buyer or rep next?

Your working sheet

Use one sheet per reviewed deal. Keep your CRM as the shared source of truth and copy the agreed action back to the record.

Deal, owner, review date and reason for selection

What changed: buyer statements and actions

Rep activity and manager interpretation, labeled separately

Main risk or unknown and its evidence

Next useful action, owner and agreed date

Next review: what happened and what it means

Judge the review by whether the actions helped, not by the number of deals discussed.